

ePROCUREMENT 8.8

PO PROJECT CHANGE

After a Purchase Orders (PO) has been issued, there is often a need to change its projects. This can be done on the PO screens but only buyers have access to them and it is cumbersome making changes on multi-line, multi-project POs. A new *PO Project Change* screen was created to enable both division Resource Analysts and Procurement buyers to easily change projects on a PO. The PO Project screen lets you specify a PO and project, displays balances on PO lines that contain the specified project, and allows you to move the balance on a line to a new project. The screen does not allow you to increase or decrease the total dollars on PO lines. It also does not allow you to move less than the line's entire balance to a new project.

This topic will show you how to use the *PO Project Change* screen to change a PO's project.

1. Manually navigate to the *PO Project Change* screen as follows:
 - Log into PeopleSoft FMS
 - Navigate to **Purchasing | Purchase Orders | PO Project Change**
2. Enter the **PO Number** of the PO whose project you want to change.
3. Click the search icon next to the **From Project ID** box. This will open a screen showing a list of projects on the PO.

PO Project Change - Windows Internet Explorer

https://fmsrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_PO_ZP_f

PO Project Change

Menu

- Items
- Vendors
- Purchasing
 - Requisitions
 - Request for Quotes
 - Procurement Contracts
 - Purchase Orders
 - Stage/Source Requests
 - Acknowledgments
 - Manage Change Orders
 - Reconcile POs
 - Review PO Information
 - Reports
 - Budget Year End Processing
 - Add/Update Express POs
 - Add/Update POs
 - Approve Amounts
 - Approve ChartFields
 - Reserve PO IDs
 - Maintain Distributions
 - Dispatch POs
 - Reassign Certifier
 - Verify Document Tolerance
 - Budget Check
 - Entry Event Request
 - Create Backorders
 - Approval Workflow
 - Acknowledgment Worksheet
 - PO Project Change**
 - Receipts
 - Return To Vendor
 - Procurement Cards
 - Supplier Schedules
 - Analyze Procurement
- eProcurement
- Services Procurement

PO Project Change

PO Number: 6719288

From Project ID: [Search Icon]

To Project ID: [Search Icon]

Vendor: [Empty]

Lien Balance to transfer: 0.000

PO Details

Line	Update	Line Description	Sched Nbr	PO Dist Line	PO Qty	Vouchered Qty
[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]	[Empty]

Select All Clear All

Update Changes Clear Worksheet

- Click on the project you want to change.

Look Up From Project ID

Business Unit: LBNL
PO Number: 6719288
Project: begins with

Look Up Clear Cancel Basic Lookup

Search Results

Project
80FKH1
E466B1

- See a list of PO lines that contain your project together with their balances. Lines in red have \$0 balance for that project. Balances are shown on other lines.

PO Project Change

'PO Number: 6719288' 'From Project ID: E466B1' 'To Project ID: '

Vendor: RLW ANALYTICS INC Lien Balance to transfer: 62145.970

Line	Update	Line Description	Sched Nbr	PO Dist Line	PO Qty	Vouchered Qty	PO Qty Available	PO Merchandise Amount	Vouchered Amount	Pending Voucher Amount	PO Merchandise Amount Available
2		Adding funds to PO 6719288 with RLW Analytics to modify Phase 2 of the CERTS Demand Response Project. Pl: Joe Eto, ProjID 80FK-H1.	1	2	15002.6800	15002.6800	0.0000	15002.680	15002.680		0.000
3		Add two additional projects and funding to existing subcontract #6719288 with RLW Analytics. Projects are part of the ongoing CERTS Demand Response Project. Pl: Joe Eto, Project ID 6731-55.	1	1	24750.0000	24750.0000	0.0000	24750.000	24750.000		0.000
4		Mod. to RLW Analytic (6719288)	1	1	10750.0000	10750.0000	0.0000	10750.000	10750.000		0.000
5	<input checked="" type="checkbox"/>	Increase subcontract 6719288 with RLW Analytics	1	1	34133.0000	34128.5300	4.4700	34133.000	34128.530		4.470
6	<input checked="" type="checkbox"/>	Modification #5 to subcontract #6719288 with RLW Analytics to add tasks and funds. RLW will continue to analysis, plan and market tasks that have been approved, \$47,057 funding is only for stage 1. Pl: Joe Eto, Project id E466B1	1	1	47014.0000	45972.5000	1041.5000	47014.000	45972.500		1041.500
7	<input checked="" type="checkbox"/>	Modification to subcontractor #6719288 with RLW to install and remove temperature loggers to tests homes this summer. Pl: Joe Eto, Project ID E466B1	1	1	11915.0000	5275.0000	6640.0000	11915.000	5275.000	2750.000	6640.000

☒ Select All ☐ Clear All

Update Changes Clear Worksheet

6. In the **To Project ID** box, enter the new project you want the balances moved to.

By default, all available PO lines with the "From Project ID" are checked. Uncheck any PO lines which should not have their project changed.

Note: The screen may not initially display all PO lines that contain the project. To view other lines, use the navigation buttons and links in the blue bar (highlighted in green). In the below example, only lines 1-6 of 8 lines are displayed. Click the **View All** link to see all the lines.

PO Project Change - Windows Internet Explorer

https://fmssrv2.lbl.gov:8101/psp/fmstrn/EMPLOYEE/ERP/c/LBNL_PO_ZP_RUN_ZPOA0500.GBL?FolderPath=PORTAL_ROOT_OBJECT.EPPO_

PO Project Change

Home Add to Favorites Sign out

New Window Help Customize Page

PO Project Change

'PO Number' 6719288 'From Project ID' E466B1 'To Project ID' 303120

Vendor: RLW ANALYTICS INC Lien Balance to transfer: 62145.970

PO Details

Customize Find View All First 1-6 of 8 Last

Line	Update	Line Description	Sched Nbr	PO Dist Line	PO Qty	Vouchered Qty	PO Qty Available	PO Merchandise Amount	Vouchered Amount	Pending voucher Amount	PO Merchandise Amount Available
2	<input type="checkbox"/>	Adding funds to PO 6719288 with RLW Analytics to modify Phase 2 of the CERTS Demand Response Project. PI: Joe Eto, ProjID 80FK-H1.	1	2	15002.6800	15002.6800	0.0000	15002.680	15002.680		0.000
3	<input type="checkbox"/>	Add two additional projects and funding to existing subcontract #6719288 with RLW Analytics. Projects are part of the ongoing CERTS Demand Response Project. PI: Joe Eto, Project ID 6731-55.	1	1	24750.0000	24750.0000	0.0000	24750.000	24750.000		0.000
4	<input type="checkbox"/>	Mod. to RLW Analytic (6719288)	1	1	10750.0000	10750.0000	0.0000	10750.000	10750.000		0.000
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☒ Select All ☐ Clear All

Update Changes Clear Worksheet

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7. Click the **Update Changes** button to save your changes and move balances on checked lines to the new project.
8. Click the **Clear Worksheet** button to clear your data and work on another PO.